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## **Energy Industry Rules**

### **Industry Rule 1. Additional Definitions**

In addition to the definitions in General Rules 3 to 3.16, the following definitions apply to the defined terms, which will appear with the initial letter capitalized when used in these Industry Rules.

#### **1.1 Contract**

An agreement between a Utility and a developer or customer to provide service under rates or conditions not offered in the Utility's tariffs.

#### **1.2 Industry Rule**

An Industry Rule contained in the Energy Industry Rules, as set forth in General Order 96-B or its successor.

#### **1.3 Staff**

The Energy Division (or its successor).

#### **1.4 Utility**

A public Utility that, as defined in the Public Utilities Code, is an electric, gas, heat, or pipeline corporation.

### **Industry Rule 2. Submitting a Document (see General Rule 7.1)**

The Energy Division Filings Room will process documents submitted to the Energy Division for filing, including information-only filings and advice letters and associated documents (such as protests, responses, replies, and supplements). A document may be submitted in person, by delivery service, or by mail to the Energy Division Filings Room, 505 Van Ness Ave., 4<sup>th</sup> Floor, San Francisco, CA 94102-3298.

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A Utility submitting an advice letter shall provide an original and five copies of the advice letter, one copy of the workpapers (if any), and an original and five copies of each affected tariff sheet. A Utility submitting an information-only filing shall submit an original and one copy, and shall cite the statute or Commission order requiring the filing.

#### **Industry Rule 3. Serving Advice Letters** (see General Rules 4.3, 7.2)

On or before the date an advice letter is submitted for filing, in addition to serving the advice letter as required by General Rule 7.2, the Utility shall serve the advice letter as follows:

- (1) If the advice letter requests approval of a Contract or other deviation, serve all parties to the Contract or other deviation.
- (2) If the advice letter requests approval of rates for an oil pipeline not previously in Utility service, serve all current or potential customers of the oil pipeline.
- (3) If the advice letter requests approval of a rate change for an oil pipeline already in Utility service, serve all shippers and submit to the Energy Division Filings Room at least 30 days before the requested effective date.
- (4) Except for an advice letter described in (3) of this Industry Rule, if the advice letter requests a change that would cause an increase in a rate or charge, reduction in service, discontinuance of a program, closing a rate schedule to new customers, canceling a rate schedule, or abandoning service to an area, serve all affected customers.
- (5) If the advice letter proposes a new product or service, serve all Utilities and other providers that may compete within the area to be served.

#### **Industry Rule 4. Numbering Advice Letters**

For each type of service rendered, a Utility shall number its advice letters sequentially, beginning with No. 1, followed by a letter designating the type of

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service (E for electric, G for natural gas, H for heat, O for oil pipeline). A Utility may not reuse an advice letter number, regardless of whether the advice letter bearing that number was approved, withdrawn, or rejected. (See also General Rules 5.5, 5.6.)

#### **Industry Rule 5. Tier Classifications for Advice Letters**

A Utility submitting an advice letter shall designate the appropriate tier, based on the content of the advice letter. A Tier 1 or Tier 2 advice letter is subject to disposition under General Rule 7.6.1; a Tier 3 advice letter is subject to disposition under General Rule 7.6.2.

##### **5.1 Matters Appropriate to Tier 1 (Effective Pending Disposition)**

A matter appropriate to Tier 1 may be designated by a Utility in its advice letter as effective pending disposition. (For advice letters pursuant to General Rule 8.2.3, see Industry Rule 5.3.) Matters appropriate to Tier 1 are:

- (1) A tariff change in compliance with specific requirements of a statute or Commission order where the wording of the change follows directly from the statute or Commission order.
- (2) An editorial change to the text of a tariff, i.e., a change that does not affect a rate, charge, term, or condition under the tariff.
- (3) A change in a rate or charge pursuant to an index or formula that the Commission has approved for use in an advice letter by the Utility submitting the advice letter, not including the first time the Utility uses that index or formula. This Industry Rule does not cover a change pursuant to a methodology, such as a methodology approved by the Commission for use by a Utility for performance-based ratemaking.
- (4) A Contract that conforms to a Commission order authorizing the Contract, and that requests no deviation from the authorizing order (e.g., a gas storage Contract in exact conformity with Decision 93-02-013).

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- (5) Establishment of tariff rates and charges for an oil pipeline that has not previously filed any tariffs with the Commission.
- (6) Initial tariffs for a new service by an oil pipeline, including service on a pipeline segment commencing Utility service.
- (7) A change to an existing tariff rate by an oil pipeline, as provided in Industry Rule 8.

**5.2 Matters Appropriate to Tier 2 (Effective After Staff Approval)**

Matters appropriate to Tier 2 are:

- (1) A change in a rate or charge pursuant to an index or formula that the Commission has approved for use in an advice letter by the Utility submitting the advice letter but that the Utility has not used previously for this purpose. This Industry Rule does not cover a change pursuant to a methodology, such as a methodology approved by the Commission for use by a Utility for performance-based ratemaking.
- (2) A tariff change that is consistent with authority the Commission previously has granted to the Utility submitting the advice letter, such as a rate change within a price floor and ceiling previously approved by the Commission for that Utility.
- (3) A refund program to comply with a Commission order requiring the refund.
- (4) A request relating to a substation or power line under Section III.B.1 of General Order 131.
- (5) A rate or revenue requirement update for performance-based ratemaking as approved by the Commission for the Utility submitting the update.

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- (6) Amortization of a balance in a balancing account if the Commission has specified both (i) the amortization period, and (ii) the rate component by which the balance will be amortized.
- (7) An advice letter otherwise appropriate to Tier 1 but for which the Utility submitting the advice letter requests review and disposition under Tier 2.

**5.3 Matters Appropriate to Tier 3 (Effective After Commission Approval)**

An advice letter submitted under (8) of this Industry Rule may be designated by the Utility as effective pending disposition; all other matters appropriate to Tier 3 may become effective only after Commission approval. Matters appropriate to Tier 3 are:

- (1) A matter appropriate to an advice letter but not subject to review and disposition under Tier 1 or 2. (See General Rules 5.1, 5.2.)
- (2) A tariff change in compliance with a statute or Commission order where the wording of the change does not follow directly from the statute or Commission order.
- (3) Except as provided in Industry Rule 5.1(6), a new product or service.
- (4) Except for a change that may be submitted by advice letter pursuant to Industry Rule 5.1(1), 5.1(3), 5.1(7), 5.2(1), or 5.2(2), a change that would result in an increase to a rate or charge or a more restrictive term or condition, which change has been authorized by statute or by other Commission order to be requested by advice letter.
- (5) Except as provided in Industry Rule 5.1(4) and in (8) of this Industry Rule, a Contract or other deviation. (See also Industry Rule 7.)
- (6) Withdrawing a service, abandoning service within an area, canceling a rate schedule, or closing a rate schedule to new customers.

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- (7) A fund transfer within or between demand-side management or research, development, and demonstration balancing accounts.
- (8) Service to a government agency pursuant to General Rule 8.2.3.
- (9) A change to a rate or charge pursuant to a methodology approved by the Commission for use in an advice letter, such as an annual performance review for performance-based ratemaking as approved by the Commission for the Utility submitting the advice letter.

### **Industry Rule 6. Additional Tariff Requirements**

Industry Rules 6.1 to 6.4 contain tariff requirements that, as authorized by the General Rules (see in particular General Rules 8.1, 8.5, and 8.5.4), are other than or in addition to the General Rule requirements for Internet publication, service area description, and tariff contents.

#### **6.1 Internet Publication**

A Utility that must comply with the requirement to publish its tariffs at an Internet site (see General Rule 8.1.2) shall implement the requirement as follows. The requirement shall apply to each tariff sheet used by the Utility on or after the date upon which the Utility must publish its tariffs at a site on the Internet. As of that date, the Utility shall publish all of its tariff sheets then in effect or pending review and disposition. From that date onward, the Utility shall publish within five business days each new tariff sheet that it submits for review and disposition. For each published tariff sheet, the Utility shall also publish and keep up-to-date the status of the tariff sheet (i.e., in effect; pending review and disposition; withdrawn (see General Rule 5.4); rejected; or no longer in effect). A tariff sheet number may be used only once, and all tariff sheets published at the Utility's Internet site shall remain accessible at the site unless and until the Commission authorizes an alternative electronic means of publishing and enabling public access to the Utility's tariffs.

#### **6.2 Service Area**

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A Utility shall include in the verbal description of its service area (see General Rule 8.5.4) a list of the zip codes that are wholly or partially within the service area.



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#### **6.3 Written Agreement Required by Tariff**

If a tariff provides that a written agreement must be executed by a customer as a condition to the customer's receiving service under the tariff, the executed agreement need not be submitted for approval or filing; however, when submitting the tariff for approval, the Utility shall submit the form of agreement that will be used for purposes of the tariff. The form shall contain substantially the following clause: "This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction."

#### **6.4 Tariff Rules**

A Utility shall include in its tariffs, in addition to the tariff rules specified in General Rule 8.5.7, the following tariff rules, numbered as shown:

Tariff Rule 17: Meter Tests and Adjustment of Bills for Meter Error

Tariff Rule 18: Supply to Separate Premises and Resale

#### **Industry Rule 7. Contract or Other Deviation**

##### **7.1 Generally**

After a Utility enters into a Contract or other deviation, the Utility shall submit an advice letter requesting approval and updating its list of Contracts and other deviations (see General Rule 8.5.6). The Contract shall contain substantially the following clause: "Unless otherwise expressly ordered by the California Public Utilities Commission, this Contract at all times shall be subject to such modifications as the Commission may direct from time to time in the exercise of its jurisdiction." In addition, except for a Contract that is authorized to be submitted pursuant to Industry Rule 5.1(4) or 5.3(8), the Contract shall contain substantially the following clause: "This Contract does not become effective unless and until approved by the California Public Utilities Commission."

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#### **7.2 Customer Protest**

A customer may protest an advice letter in which a Utility seeks approval of a Contract or other deviation for the purpose of providing service to that customer. Such protest, if it only concerns a rate or charge under the Contract or other deviation, may include a request for service pending disposition of the advice letter. Staff will approve the request for service unless, based either on another protest or Staff's own analysis, Staff finds that there is a substantial issue that should be resolved before service is provided; however, if Staff approves the request, Staff will require the customer, as a condition of such service, to deposit with the Commission the sum(s) of money in dispute pending disposition of the advice letter.

#### **Industry Rule 8. Rate Change by Oil Pipeline** (see Public Utilities Code Section 455.3)

The following procedures govern review and disposition of an advice letter requesting approval of a rate change by an oil pipeline already in Utility service. These procedures, to the extent they are inconsistent with the procedures otherwise provided by this General Order (see General Rules 7.5, 7.6.1; Industry Rules 5, 5.1), supersede the latter procedures.

#### **8.1 Effective Date; Suspension**

An oil pipeline shall submit its advice letter requesting approval of a rate change (see Industry Rule 2), and shall serve the advice letter on all affected shippers, at least 30 days in advance of the requested effective date. (See Industry Rule 3.) The rate change, on the later of the requested effective date or 30 days after the date of filing, may be made effective pending disposition of the advice letter; however, if a requested increase exceeds a maximum of 10 percent per 12-month period, only the portion of the rate increase not exceeding that maximum may be effective pending disposition.

Staff may suspend a rate change, including an increase up to and including the maximum, once only and for a period not to exceed 30 days from the date when the oil pipeline might otherwise put the rate change into effect; the

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suspended rate change may be made effective at the end of that suspension, even if disposition of the advice letter is still pending. The portion that exceeds the maximum shall become effective only as provided in Industry Rule 8.2.

**8.2 Disposition**

Only a rate change that is neither suspended by Staff nor protested, and only to the extent it is not an increase exceeding the maximum (see Industry Rule 8.1), will be deemed approved, and such deemed approval will occur 30 days after the date of filing. An advice letter that is suspended but not protested and that does not request a rate increase exceeding the maximum will be subject to disposition as provided in General Rule 7.6.1. An advice letter that either is protested or requests a rate increase exceeding the maximum will be disposed of by resolution.

Within 30 days after the date of disposition of the advice letter, the oil pipeline shall refund to all shippers, with interest computed at the three-month commercial paper rate published by the Federal Reserve Board and accruing from the date the new rate was first charged, any portion of the rate change that is disapproved. For an advice letter that requests a rate increase exceeding the maximum, the disposition of the advice letter will determine the appropriateness of allowing retroactive charge and collection of an approved rate increase above the maximum.

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**Exhibit A: Sample Tariff Book Title Sheet**

DYNAMO ELECTRIC COMPANY (U123C)  
Any City, CA 90000-1234

ELECTRIC TARIFF BOOK  
1<sup>ST</sup> Revised Cal. PUC Sheet 1  
Cancels Original Cal. PUC Sheet 1

TARIFFS

Applicable To

ELECTRIC SERVICE

including

Rates and Rules Affecting Rates and Services  
of  
DYNAMO ELECTRIC COMPANY  
(Name of Utility)

4 Road Runner Road, Post Office Box 2,  
Any City, CA 90000-1234  
(Mailing Address)

Operating In or Near  
Mojave County, Calif.  
(City or Town and County)

Contact Person: Mr. Wil E. Coyote  
Telephone No. 800-555-1234

Website: [www.dynamo-energy.com](http://www.dynamo-energy.com)  
Email Address: [coyote@dynamo.com](mailto:coyote@dynamo.com)

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(Mailing Address if different from above)

This version of the California Public Utilities Commission (PUC) Tariff Book for DYNAMO ELECTRIC COMPANY is effective on the dates shown on the bottom of each sheet. This tariff book implements a new numbering system and other conventions set forth in Commission General Order 96-B, which was adopted in Decision (D.) D.98-XX-XXX.

The following tariff schedules embracing Rates and Rules have been regularly filed with the Public Utilities Commission of the State of California and are the effective rates and rules of this utility.

No officer, inspector, solicitor, agent or employee of the utility has any authority to waive, alter or amend these tariff schedules or any part thereof in any respect.

(To be inserted by  
utility)

Issued by

(To be inserted by Cal. PUC)

Advice No. 1  
Dec. No. D.64-12-001

Wil E. Coyote  
Chief Financial  
Officer & Treasurer  
TITLE

Date Filed Jan 01 1965  
Effective Jan 06 1965  
Resolution No.

**APPENDIX B****Exhibit B: Sample Tariff Book Table of Contents**

ELECTRIC TARIFF BOOK

DYNAMO ELECTRIC COMPANY (U123C)  
Any City, CA 90000-1234

1<sup>ST</sup> Revised Cal. PUC Sheet 3  
Cancels Original Cal. PUC Sheet 3

TITLE PAGE 1

HOW TO USE THIS TARIFF BOOK 2

SYMBOLS AND ACRONYMS USED IN THIS TARIFF BOOK 2

TABLE OF CONTENTS 3

CHECK SHEET 4

LIST OF ABBREVIATIONS, ETC. 5

PRELIMINARY STATEMENT 6

SERVICE AREA 7

RESIDENTIAL SERVICE 8

SERVICE TO COMPANY EMPLOYEES 9

MASTER-METERED MULTIFAMILY SERVICE 10

RESIDENTIAL RATE SCHEDULES 11

SCHEDULE E-1 – RESIDENTIAL SERVICE 12

SCHEDULE EE – SERVICE TO COMPANY EMPLOYEES 13

SCHEDULE EM – MASTER-METERED MULTIFAMILY SERVICE 14

SCHEDULE ES – MULTIFAMILY SERVICE 15

SCHEDULE ESR – RESIDENTIAL RV PARK AND RESIDENTIAL MARINA SERVICE 16

SCHEDULE ET – MOBILEHOME PARK SERVICE 17

SCHEDULE E-7 – RESIDENTIAL TIME-OF-USE SERVICE 18

SCHEDULE E-A7 – EXPERIMENTAL RESIDENTIAL ALTERNATE PEAK TIME-OF-USE SERVICE 19

SCHEDULE E-8 – RESIDENTIAL SEASONAL SERVICE OPTION 20

SCHEDULE E-9 – EXPERIMENTAL RESIDENTIAL TIME-OF-USE SERVICE FOR LOW EMISSION VEHICLE  
CUSTOMERS 21

SCHEDULE E-SEG – RESIDENTIAL SOLAR ELECTRIC GENERATING FACILITY SERVICE 22

(continued)

(To be inserted by utility)

Issued by

(To be inserted by Cal. PUC)

Advice Letter No. 972

Wil E. Coyote

Date Filed Jan 17 2001

Vice President

Effective Jan 21 2001

Dec. No. D.01-01-010

Regulatory Affairs

Resolution No.

TITLE

## APPENDIX B

## Exhibit C: Sample Tariff Sheet

ELECTRIC TARIFF BOOK

DYNAMO ELECTRIC COMPANY (U123C)  
Any City, CA 90000-1234

Original Cal. PUC Sheet 12  
Cancels Cal. PUC Sheet 15236

## E-1 Residential Service

## 1.1 GENERAL

## 1.1.1 APPLICABILITY

Applicable to alternating current electric service for lighting, cooking, heating or power, or any combination thereof.

## 1.1.2 TERRITORY

Within the rate areas of Alpha, Beta, and Gamma as described by the Rate Area Maps.

## 1.2 RATES

	Per Meter
	Per Month
Service Charge	\$5.00
Energy Charge (to be added to Service Charge):	
Baseline 300 kWh, per kWh	\$0.10
All Energy in Excess of 300 kWh per month:	
Non-Baseline Above 300 kWh, per kWh	\$0.12

## 1.3 SPECIAL CONDITIONS

Baseline rates are applicable only to separately-metered residential use.

(To be inserted by utility)

Issued by

(To be inserted by Cal. PUC)

Advice No. 123

J.D. Magnum  
Vice President

Date Filed Jan 17 2001

Effective Jan 21 2001

Dec. No. D.01-01-011

Regulatory Affairs

Resolution No. \_\_\_\_\_

TITLE

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**Exhibit D: Sample Advice Letter Wording**

(Letterhead if Available)

Advice Letter No. 973

DYNAMO ELECTRIC COMPANY (U 123 C)

**TIER 3**

January 31, 2001

Public Utilities Commission of the State of California

DYNAMO ELECTRIC COMPANY requests approval of the changes in the following tariff schedules applicable to its \_\_\_\_\_(describe service)\_\_\_\_\_.

Cal PUC Sheet No.	Title of Sheet	Canceling Cal. PUC Sheet No.
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The effective date of the tariff schedules is requested to be \_\_\_\_\_.

(These tariff changes are being submitted pursuant to D.\_\_\_\_\_, dated \_\_\_\_\_ in A.\_\_\_\_\_. (or) Resolution \_\_\_\_\_, dated \_\_\_\_\_.)

Notice has been provided as required by GO 96. The Service List is attached to this Advice Letter (or "This Advice Letter was served on the same parties as Advice Letter #\_\_\_\_\_, dated \_\_\_\_\_.")

**STANDARD PROTEST STATEMENT**

Anyone may protest this advice letter to the California Public Utilities Commission. The protest must set forth the specific grounds on which it is based, including such items as financial and service impacts. A protest must be made in writing and received within 20 days of the date this advice letter appears on the Daily Calendar. A copy must be mailed to the Utility on the same date it is mailed or delivered to the Commission. The address for mailing or delivering a protest to the Commission is:

Energy Division Filings Room  
California Public Utilities Commission  
505 Van Ness Avenue, 4<sup>th</sup> Floor  
San Francisco, CA 94102-3298

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Inquiries concerning this advice letter and service of any protest may be made to:

Name of Designated Individual  
Title  
Telephone Number  
Mailing Address)

This is a Tier (1, 2, 3 or 4) advice letter; for further information on Notice, Protest, Disposition, and Appeal processes for this advice letter, consult Commission General Order 96-B.

TYPICAL WORDING TO OFFER NEW SERVICE

This filing provides a new service not previously offered or furnished. This filing will not increase any rate or charge, cause the withdrawal of service, or conflict with other schedules or rules. It is desired that this filing become effective on [specify the desired effective date]. (Include a brief description of the new service.)

TYPICAL WORDING FOR AN INCREASE IN RATES (COMPLIANCE)

These tariff schedules are submitted pursuant to Decision \_\_\_\_\_, dated \_\_\_\_\_, in Application \_\_\_\_\_, dated \_\_\_\_\_ [or Resolution \_\_\_\_\_, dated \_\_\_\_\_], which states:

(quote ordering paragraph from decision or resolution)

TYPICAL WORDING FOR A DECREASE IN RATES

This advice letter covers a reduction in the rate for (electric service - give full details) in the \_\_\_\_\_ service area. There are no increases involved in this advice letter nor will it result in withdrawal of any service or conflict with other schedules or rules. It is desired that this decrease become effective on [specify the desired effective date].

**(End of Exhibit D)**



**APPENDIX B****Exhibit E: Sample Advice Letter Cover Sheet****CALIFORNIA PUBLIC UTILITIES COMMISSION****ADVICE LETTER FILING SUMMARY  
ENERGY UTILITY****MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)**

Company name: \_\_\_\_\_

Utility type:

☐ ELC      ☐ GAS☐ PLC      ☐ HEAT

CPUC utility #: U-\_\_\_\_\_

Contact name: \_\_\_\_\_

Phone #: (\_\_\_\_) \_\_\_\_\_

**EXPLANATION OF UTILITY TYPE**

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

(Date Filed/ Received Stamp by CPUC)

Filing #: \_\_\_\_\_ Requested Tier: \_\_\_\_\_

Keyword (See list on reverse, or [www.cpuc.ca.gov](http://www.cpuc.ca.gov)): \_\_\_\_\_

Authorization for AL (e.g., decision, resolution, legislation #): \_\_\_\_\_

Requested effective date: \_\_\_\_\_ Number of tariff sheets: \_\_\_\_\_

Estimate annual revenue effect: \$ \_\_\_\_\_

Tariff schedules affected: \_\_\_\_\_

Pending Advice Letters that affect the Tariff schedules cited: \_\_\_\_\_

Affected Service: \_\_\_\_\_

Subject of AL: \_\_\_\_\_

Customer privacy implications: ☐ Yes. If yes, please explain in advice letter. ☐ No**FOR CPUC OFFICE USE ONLY**☐ No Resolution Required  
(Analysis attached)☐ Resolution Required  
(Draft attached)

\_\_\_\_\_ To Supervisor

\_\_\_\_\_ To Branch Chief

\_\_\_\_\_ To Director

☐ Executive Action Resolution☐ Resolution # (E-, G-, or O-): \_\_\_\_\_

Assigned Supv/Analyst: \_\_\_\_\_/\_\_\_\_\_

AL Due

Date: \_\_\_\_\_ Due to

Supv: \_\_\_\_\_ Analyst

Completion Date: \_\_\_\_\_ Supv.

Review Date: \_\_\_\_\_

AL/Tariff Effective Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**APPENDIX B****Exhibit F: Sample Information-Only Filing Cover Sheet****CALIFORNIA PUBLIC UTILITIES COMMISSION****INFORMATION-ONLY FILING COVER SHEET  
ENERGY UTILITY****MUST BE COMPLETED BY UTILITY**

Company name: \_\_\_\_\_

Utility type:

☐ ELC      ☐ GAS☐ PLC      ☐ HEAT

CPUC utility #: U-\_\_\_\_\_

Contact name: \_\_\_\_\_

Phone #: (\_\_\_\_\_) \_\_\_\_\_

**EXPLANATION OF UTILITY TYPE**

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

(Date Filed/ Received Stamp by CPUC)

Filing Subject/Issue Area: \_\_\_\_\_

Filing Type (Annually, Quarterly, Monthly, Daily, One-Time, etc.): \_\_\_\_\_

Filing Due Date: \_\_\_\_\_

Additional notes: \_\_\_\_\_  
\_\_\_\_\_**FOR CPUC OFFICE USE ONLY**

Assigned Supv/Analyst: \_\_\_\_\_/\_\_\_\_\_

Review Date: \_\_\_\_\_

Non-compliance letter: \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_

Filed Date: Analyst Completion Date: \_\_\_\_\_

**(END OF APPENDIX B)**